

T 0 9 0 2 0 " 4 1 6 3 0 0 6 6 0

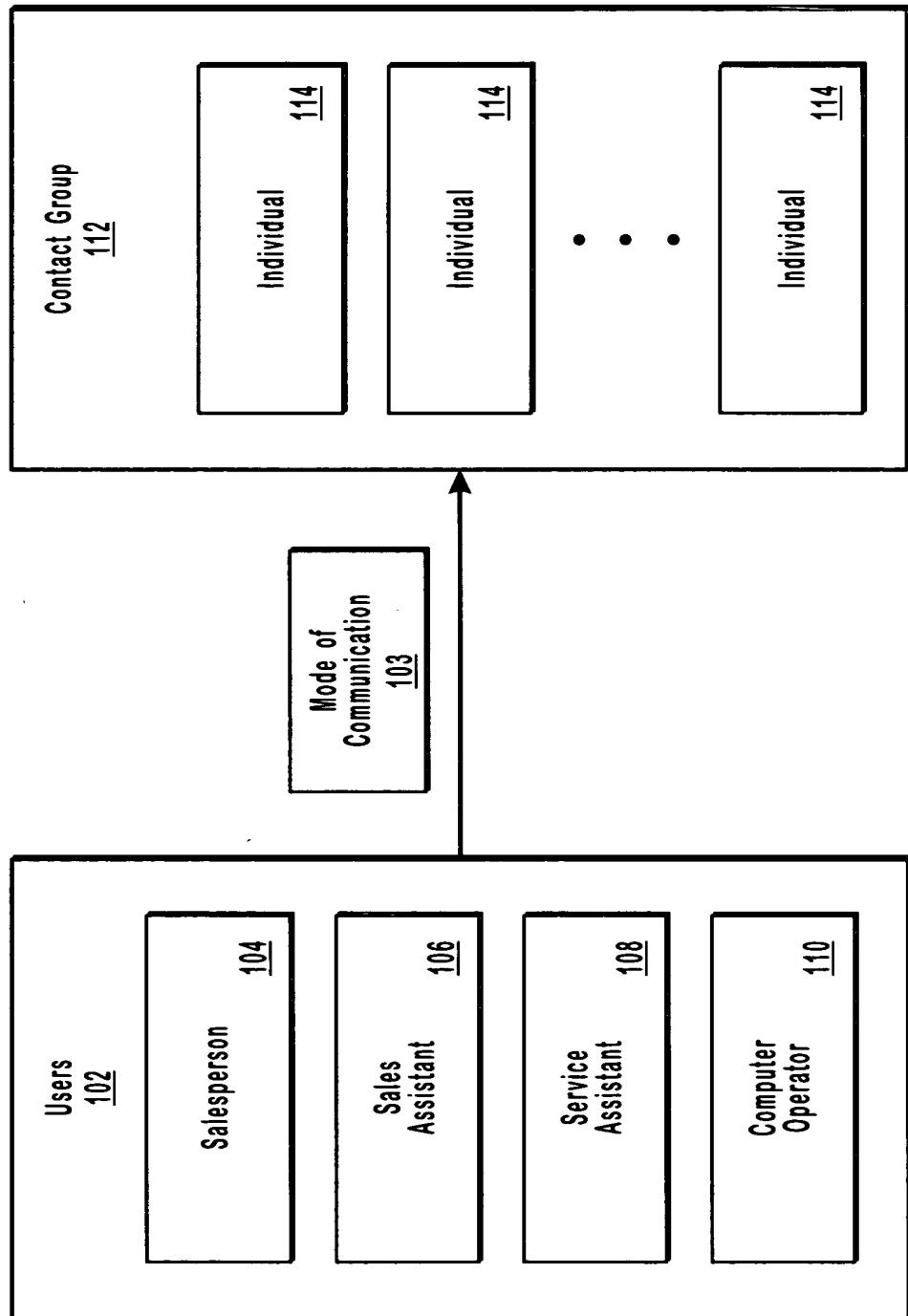


FIG. 2

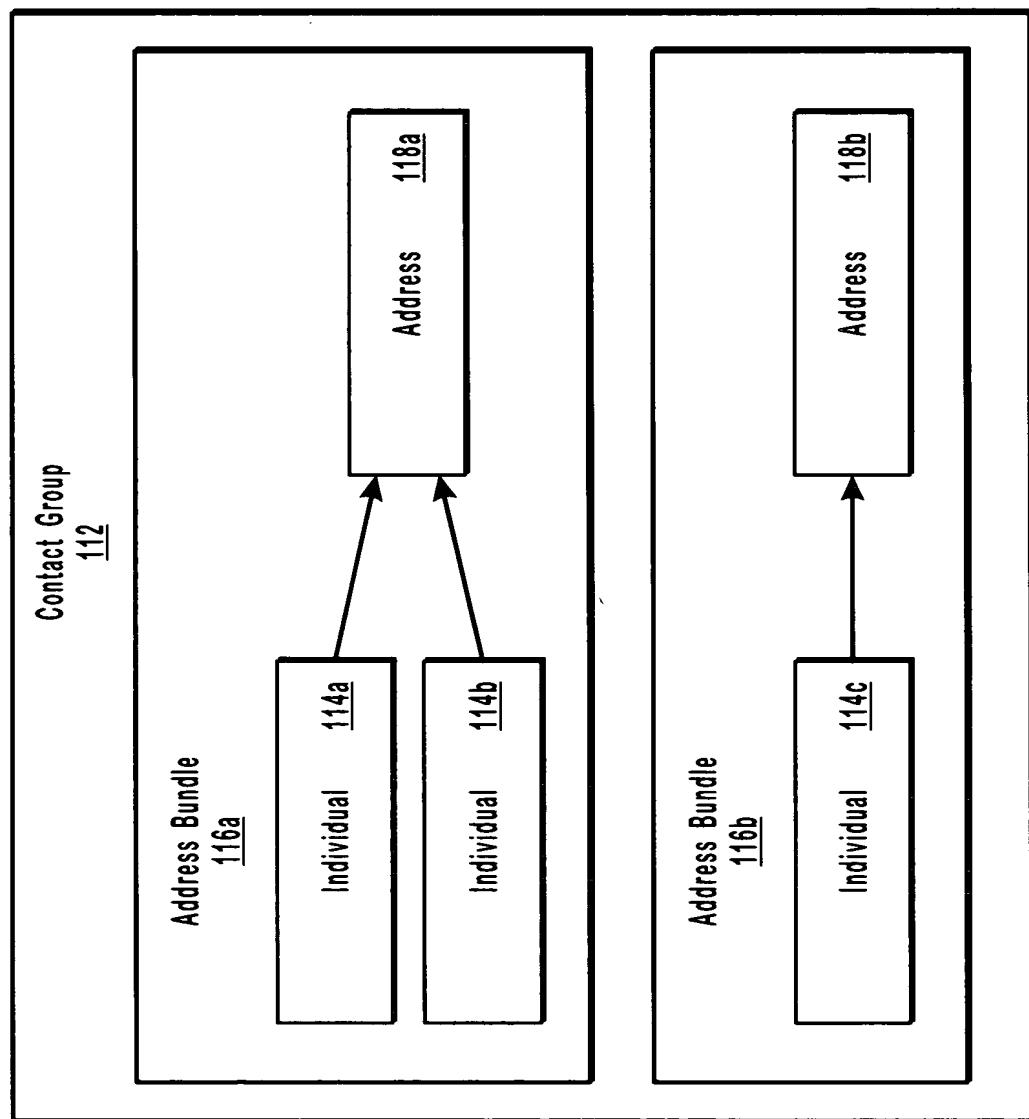


FIG. 3A

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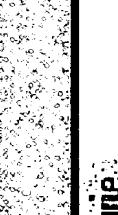
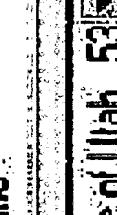
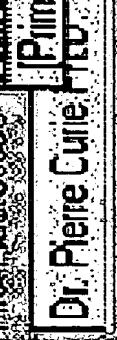
				
				
				

FIG. 3B

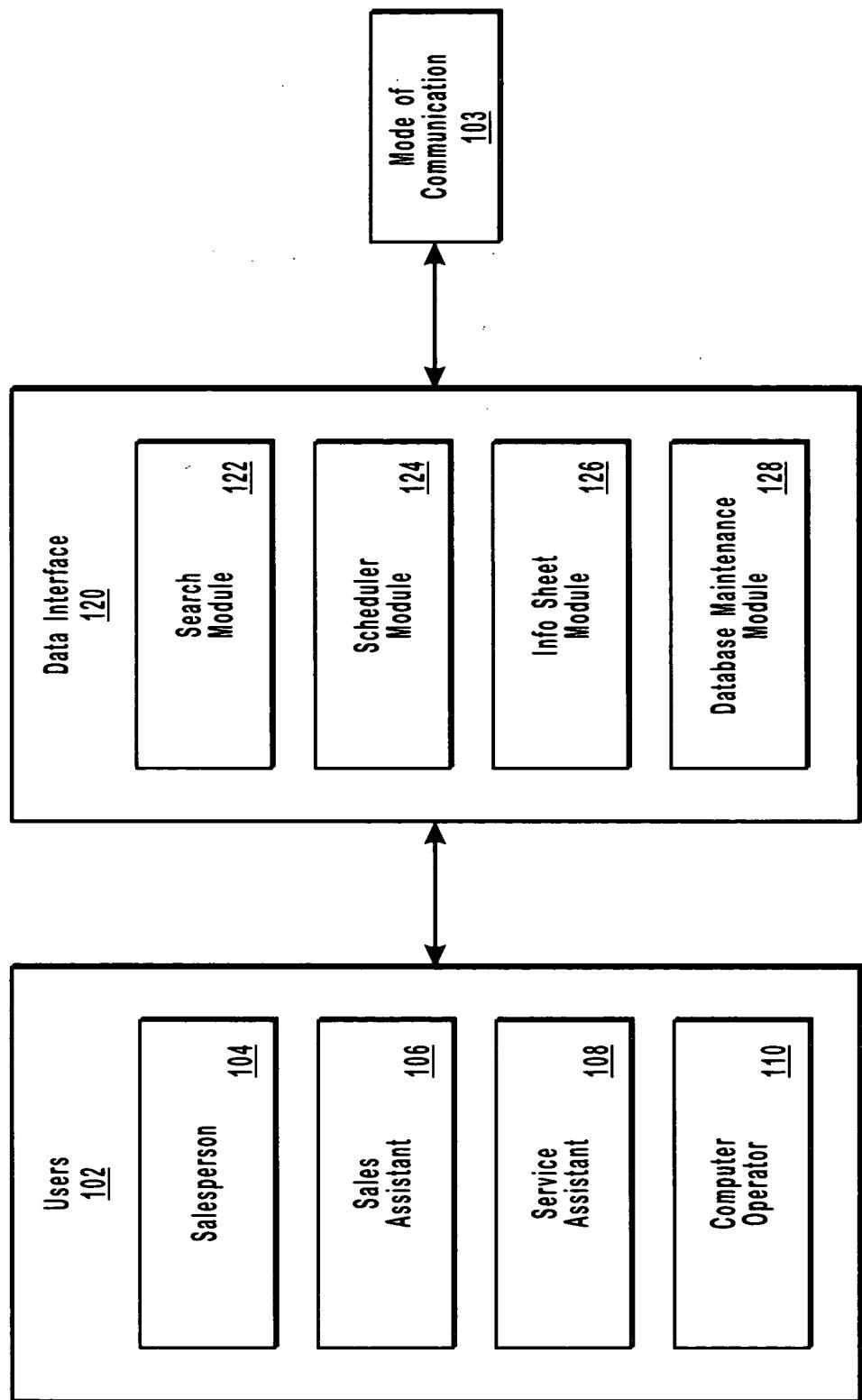


FIG. 4

1000000000000000

Search Results	
<input checked="" type="checkbox"/> A	A
<input checked="" type="checkbox"/> C	C
<input checked="" type="checkbox"/> Connection	Connection
<input checked="" type="checkbox"/> Mass Mail	Mass Mail
<input checked="" type="checkbox"/> Prospect	Prospect
<input checked="" type="checkbox"/> Other	Other
<input checked="" type="checkbox"/> Individual	Individual
<input checked="" type="checkbox"/> A	A
<input checked="" type="checkbox"/> Male	Male
<input checked="" type="checkbox"/> Female	Female
<input checked="" type="checkbox"/> Unknown	Unknown
<input checked="" type="checkbox"/> Subscription Rules	Subscription Rules
<input checked="" type="checkbox"/> CO Rules	CO Rules
<input checked="" type="checkbox"/> Client Target Markets	Client Target Markets
<input checked="" type="checkbox"/> General Client Markets	General Client Markets
<input checked="" type="checkbox"/> Monthly Drip Markets	Monthly Drip Markets
<input checked="" type="checkbox"/> RFI Rules	RFI Rules
<input checked="" type="checkbox"/> Client Marketing	Client Marketing
<input checked="" type="checkbox"/> Staff Management	Staff Management
<input checked="" type="checkbox"/> BGM Stock Owners	BGM Stock Owners
<input checked="" type="checkbox"/> Date Rich	Date Rich
<input checked="" type="checkbox"/> SA Rules	SA Rules
<input checked="" type="checkbox"/> Falling thru Checks	Falling thru Checks
<input checked="" type="checkbox"/> Prospective-Clients	Prospective-Clients
<input checked="" type="checkbox"/> A-Client Clients	A-Client Clients
<input checked="" type="checkbox"/> AA-Client Clients	AA-Client Clients
<input checked="" type="checkbox"/> B-Green Clients	B-Green Clients
<input checked="" type="checkbox"/> Clients-No Ready Funds	Clients-No Ready Funds
<input checked="" type="checkbox"/> Future Opportunities-Clients	Future Opportunities-Clients
<input checked="" type="checkbox"/> Ready Funds	Ready Funds
<input checked="" type="checkbox"/> Upcoming Actions	Upcoming Actions
<input checked="" type="checkbox"/> Other-Prospects	Other-Prospects
<input checked="" type="checkbox"/> A-Dairy Prospects	A-Dairy Prospects
<input checked="" type="checkbox"/> A4-Hot Prospects	A4-Hot Prospects
<input checked="" type="checkbox"/> B-Green Prospects	B-Green Prospects
<input checked="" type="checkbox"/> C-Intl Leads	C-Intl Leads
<input checked="" type="checkbox"/> D-Pitchfestes	D-Pitchfestes
<input checked="" type="checkbox"/> Records Not Yet Sold	Records Not Yet Sold
<input checked="" type="checkbox"/> Some Returns Not Yet Sold	Some Returns Not Yet Sold
<input checked="" type="checkbox"/> SV Rules	SV Rules
<input checked="" type="checkbox"/> Danger List	Danger List
<input checked="" type="checkbox"/> Problem List	Problem List
<input checked="" type="checkbox"/> Clients With Normal Comm Status	Clients With Normal Comm Status

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Search Results	
<input checked="" type="checkbox"/> A	A
<input checked="" type="checkbox"/> C	C
<input checked="" type="checkbox"/> Connection	Connection
<input checked="" type="checkbox"/> Mass Mail	Mass Mail
<input checked="" type="checkbox"/> Prospect	Prospect
<input checked="" type="checkbox"/> Other	Other
<input checked="" type="checkbox"/> Individual	Individual
<input checked="" type="checkbox"/> A	A
<input checked="" type="checkbox"/> Male	Male
<input checked="" type="checkbox"/> Female	Female
<input checked="" type="checkbox"/> Unknown	Unknown
<input checked="" type="checkbox"/> Subscription Rules	Subscription Rules
<input checked="" type="checkbox"/> CO Rules	CO Rules
<input checked="" type="checkbox"/> Client Target Markets	Client Target Markets
<input checked="" type="checkbox"/> General Client Markets	General Client Markets
<input checked="" type="checkbox"/> Monthly Drip Markets	Monthly Drip Markets
<input checked="" type="checkbox"/> RFI Rules	RFI Rules
<input checked="" type="checkbox"/> Client Marketing	Client Marketing
<input checked="" type="checkbox"/> Staff Management	Staff Management
<input checked="" type="checkbox"/> BGM Stock Owners	BGM Stock Owners
<input checked="" type="checkbox"/> Date Rich	Date Rich
<input checked="" type="checkbox"/> SA Rules	SA Rules
<input checked="" type="checkbox"/> Falling thru Checks	Falling thru Checks
<input checked="" type="checkbox"/> Prospective-Clients	Prospective-Clients
<input checked="" type="checkbox"/> A-Client Clients	A-Client Clients
<input checked="" type="checkbox"/> AA-Client Clients	AA-Client Clients
<input checked="" type="checkbox"/> B-Green Clients	B-Green Clients
<input checked="" type="checkbox"/> Clients-No Ready Funds	Clients-No Ready Funds
<input checked="" type="checkbox"/> Future Opportunities-Clients	Future Opportunities-Clients
<input checked="" type="checkbox"/> Ready Funds	Ready Funds
<input checked="" type="checkbox"/> Upcoming Actions	Upcoming Actions
<input checked="" type="checkbox"/> Other-Prospects	Other-Prospects
<input checked="" type="checkbox"/> A-Dairy Prospects	A-Dairy Prospects
<input checked="" type="checkbox"/> A4-Hot Prospects	A4-Hot Prospects
<input checked="" type="checkbox"/> B-Green Prospects	B-Green Prospects
<input checked="" type="checkbox"/> C-Intl Leads	C-Intl Leads
<input checked="" type="checkbox"/> D-Pitchfestes	D-Pitchfestes
<input checked="" type="checkbox"/> Records Not Yet Sold	Records Not Yet Sold
<input checked="" type="checkbox"/> Some Returns Not Yet Sold	Some Returns Not Yet Sold
<input checked="" type="checkbox"/> SV Rules	SV Rules
<input checked="" type="checkbox"/> Danger List	Danger List
<input checked="" type="checkbox"/> Problem List	Problem List
<input checked="" type="checkbox"/> Clients With Normal Comm Status	Clients With Normal Comm Status

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All (Contact Group)

Group Name	Address	Phone Number	First Name	Last Name
Client	First and Last Name	555-1515	Prospect	
Connection	Dr. Alice N. Ave.	555-6567	Client	Alice is disconnected. 4/2
Mass Mail	Flor. and Mrs. He...	555-5789	Client	They do NOT want 4/2
Prospect	Sasha Bernhardt...	555-2345	Prospect	Sasha is definitely 4/2
Other	Mrs. Stichell S...	555-4449	Client	Sue manages her 4/2
Individual	Mr. Lucocid B...	555-7726	Prospect	She's cold action for 4/2
A	Burke, Alice & ...	555-1530	Prospect	Archie wants to 4/2
Male	Mrs. Michalewski ...	555-8457	Client	Buddy wants to 4/2
Female	N. Connie	(512) 565-5629	Prospect	Connie is disconnected 4/2
Unknown	Mrs. and Mrs. Chris...	555-1111	Prospect	No 4/2
Subscription Rules	Rap. and Mrs. Da...	555-2842	Client	Archie/Marcopoli. 4/2
CO Rules	Mrs. Robinson K. C...	555-1111	Prospect	Archie wants to 4/2
Client Target Markets	Craig, Pierre & Ma...	555-8457	Client	Connie is disconnected 4/2
General Client Markets	Stephen Dueau...	555-255-5829	Mass Mail	Sasha is disconnected 4/2
Monthly Drip Markets	Mr. Gene Due	(512) 565-5629	Mass Mail	Sasha is disconnected 4/2
RFI Rules	Jan Doe	(512) 565-5629	Mass Mail	Sasha is disconnected 4/2
Client Marketing	Mrs. Doe	(512) 565-5629	Mass Mail	Sasha is disconnected 4/2
Staff Management	John Doe, Esq.	1855-321-4529	Mass Mail	SHE handles the 4/2
BGM Stock Owners	Mrs. Jane Downe	1855-321-4529	Mass Mail	SHE handles the 4/2
Date Rich	Mrs. and Mrs. Nich...	555-4567	Client	Connie is disconnected 4/2
SA Rules	Nurs. Ed. Esq.	(512) 565-2582	Client	Connie is disconnected 4/2
Falling thru Checks	Mrs. Ed. Esq.	555-1313	Client	Connie is disconnected 4/2
Prospective-Clients	Dr. Albert Einstein...	(201) 285-8464	Client	Connie is disconnected 4/2
A-Client Clients	Mrs. Stephen Coff...	(201) 285-8464	Client	Connie is disconnected 4/2
AA-Client Clients	Mrs. and Mrs. Almu...	555-1010	Client	Connie is disconnected 4/2
B-Green Clients	Mrs. Heather Pyrene...	555-9987	Client	Connie is disconnected 4/2
Clients-No Ready Funds	Mrs. Phil	(512) 565-6579	Prospect	Connie is disconnected 4/2
Future Opportunities-Clients	Mr. Phil Jones	555-1212	Prospect	Connie is disconnected 4/2
Ready Funds	Mrs. Harvey W. Ol...	555-7980	Client	Connie is disconnected 4/2
Upcoming Actions	Mrs. John Bal Kip...	555-7980	Client	Connie is disconnected 4/2
Other-Prospects	Mrs. Jackie Rud...	555-7980	Client	Connie is disconnected 4/2
A-Dairy Prospects	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
A4-Hot Prospects	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
B-Green Prospects	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
C-Intl Leads	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
D-Pitchfestes	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
Records Not Yet Sold	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
Some Returns Not Yet Sold	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
SV Rules	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
Danger List	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
Problem List	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2
Clients With Normal Comm Status	Mrs. Debbie Sa...	555-7980	Client	Connie is disconnected 4/2

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Group Name	Address	Phone Number	First Name	Last Name
Client	Flor. and Mrs. He...	555-7980	Prospect	Connie is disconnected 4/2
Connection	Mrs. John Mohr	(512) 565-7415	Client	Connie is disconnected 4/2
Mass Mail	Mrs. Sam Mohr	(512) 562-4848	Client	Connie is disconnected 4/2
Prospect	Mrs. Irv N. Moore	1852-974-5624	Client	Connie is disconnected 4/2
Other	Mrs. Irene Moore	(201) 285-9224	Client	Connie is disconnected 4/2
Individual	Mrs. Ian Moor	(201) 285-9224	Client	Connie is disconnected 4/2
A	OHara, Sca...	010-123-4567	Prospect	Connie is disconnected 4/2
Male	Debby, Rud...	010-123-4567	Prospect	Connie is disconnected 4/2
Female	Rich, Juan	010-123-4567	Client	Connie is disconnected 4/2
Unknown	Public, Jenn...	010-123-4567	Client	Connie is disconnected 4/2
Subscription Rules	Public, John	010-123-4567	Client	Connie is disconnected 4/2
CO Rules	Public, Peter	010-123-4567	Client	Connie is disconnected 4/2
Client Target Markets	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
General Client Markets	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Monthly Drip Markets	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
RFI Rules	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Client Marketing	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Staff Management	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
BGM Stock Owners	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Date Rich	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
SA Rules	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Falling thru Checks	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Prospective-Clients	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
A-Client Clients	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
AA-Client Clients	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
B-Green Clients	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
C-Intl Leads	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
D-Pitchfestes	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Records Not Yet Sold	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Some Returns Not Yet Sold	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
SV Rules	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Danger List	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Problem List	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2
Clients With Normal Comm Status	Rick, Richard	010-123-4567	Client	Connie is disconnected 4/2

FIG. 5

Group Name	Address	Phone Number	First Name	Last Name
Client	Dr. Alice N. Ave.	555-6567	Client	Alice is disconnected. 4/2
Connection	Flor. and Mrs. He...	555-5789	Client	They do NOT want 4/2
Mass Mail	Sasha Bernhardt...	555-2345	Prospect	Sasha is definitely 4/2
Prospect	Mrs. Stichell S...	555-4449	Client	Sue manages her 4/2
Other	Mr. Lucocid B...	555-7726	Prospect	She's cold action for 4/2
Individual	Burke, Alice & ...	555-1530	Prospect	Archie wants to 4/2
A	Mrs. Michalewski ...	555-8457	Client	Buddy wants to 4/2
Male	N. Connie	(512) 565-5629	Prospect	Connie is disconnected 4/2
Female	Mrs. and Mrs. Nich...	555-4567	Client	Sasha is disconnected 4/2
Unknown	Nurs. Ed. Esq.	(512) 565-2582	Client	Sasha is disconnected 4/2
Subscription Rules	Mrs. Ed. Esq.	555-1313	Client	Sasha is disconnected 4/2
CO Rules	Dr. Albert Einstein...	(201) 285-8464	Client	Sasha is disconnected 4/2
Client Target Markets	Mrs. Stephen Coff...	(201) 285-8464	Client	Sasha is disconnected 4/2
General Client Markets	Mrs. and Mrs. Almu...	555-1010	Client	Sasha is disconnected 4/2
Monthly Drip Markets	Mrs. Heather Pyrene...	555-9987	Client	Sasha is disconnected 4/2
RFI Rules	Mrs. Phil Jones	555-1212	Prospect	Sasha is disconnected 4/2
Client Marketing	Mrs. Harvey W. Ol...	555-7980	Client	Sasha is disconnected 4/2
Staff Management	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
BGM Stock Owners	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Date Rich	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
SA Rules	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Falling thru Checks	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Prospective-Clients	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
A-Client Clients	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
AA-Client Clients	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
B-Green Clients	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
C-Intl Leads	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
D-Pitchfestes	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Records Not Yet Sold	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Some Returns Not Yet Sold	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
SV Rules	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Danger List	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Problem List	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2
Clients With Normal Comm Status	Mrs. Debbie Sa...	555-7980	Client	Sasha is disconnected 4/2

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Gorilla 2.0 [Background] Info Sheet: Afghanchi/Portinari	
<p>Home Messages Data Reports Campaigns Import & Export New Window Help</p> <p>Individuals in Group</p> <p>Last Contacted: Future Date PROSPECT [A = RESPONSIVE]</p> <p>Mr. Basitine Portinari [Rich] Prof. Dante Afghanchi [Dante]</p> <p>Search New Edit Delete Print Print Print Print Print</p> <p>Record 1 of 52</p> <p>Group Alphabetic/Portrait Normal/Referral 3/11/2010 9/27/2010 3/11/2010 No Contact Interval S1 Opportunity Review Interval 180 Letter Schedule Print</p> <p>Salutation: Prof. Afghanchi</p> <p>www.webs.edu/academics/leads/leadsinfo.htm</p> <p>Has Questions Set Call Action for...</p>	<p>New Edit Delete Print Print Print Print Print</p> <p>Answers/Messages Spare Non-Decision Spots w/Indirect Match</p> <p>Watch for It</p> <p>Turned Over to RR Watch for It Call...</p> <p>File New Edit Delete Print Print Print Print Print</p> <p>ALL ITEMS</p> <p>File</p> <p>3/4/2010 OPPORTUNITY Reallocate investments - JDS [02/17/2010]</p> <p>✓ 5/26/2010 ACTION Initiate Appt. Begin implementing agreed plan. They're ready to: 1st CD (\$11k) matures today. - SAB [03/11/2010]</p> <p>✓ 5/27/2010 ACTION Confirm In-Office appt. F: 5/26, 2 pm. Begin implementing plan -CD matures - SAB [03/11/2010]</p> <p>✓ 5/27/2010 LETTER SET UP CONFIRM APPOINTMENT Processing Checklist in folder. - REH [03/11/2010]</p> <p>✓ 3/21/2010 LETTER CONFIRM APPOINTMENT - Written confirmation of appt. Emailable.</p> <p>✓ 3/11/2010 ACTION Initiate Appt. Review proposal. - REH [03/04/2010]</p> <p>✓ 3/11/2010 NOTE Meeting - SAB - Completely approve proposal. Do twice to start implementing plan until first CD matures. They figure they'd better hang onto their whole small savings account "until we figure out our tax return." - SAB [03/04/2010]</p> <p>✓ 3/11/2010 ACTION Confirm In-Office appt. Th, 3/11, 4 pm. present plan. - SAB [03/04/2010]</p> <p>✓ 3/11/2010 ACTION For appt. tomorrow (or next work day), review Appointment Processing Checklist in folder. - REH [03/11/2010]</p> <p>✓ 3/11/2010 LETTER SENT CONFIRM APPOINTMENT - Written confirmation of appt. Emailable.</p> <p>✓ 3/4/2010 ACTION Initiate Appt. Gather info. - SAB [02/17/2010]</p> <p>✓ 3/4/2010 NOTE Meeting - JDS - Rich has been thoroughly frightened about their financial future. Their investments are virtually all fixed-income, some at really lousy rates. Rich has assured them they'll be fine if they just leave them alone. - SAB [02/17/2010]</p> <p>✓ 3/2/2010 ACTION Prepare appointment checklist for In-Office appt. tomorrow (or next work day). - SAB [02/17/2010]</p> <p>✓ 3/2/2010 LETTER SENT NEW PROSPECT-A-ITCH-IN-OFFICE APPT. Confirms profile, appointment w/ hot new prospect. Emailable.</p> <p>✓ 2/25/2010 LETTER SENT LEAD PROCESSING NEW PROSPECT-A-ITCH-IN-OFFICE APPT. Confirms profile, appointment w/ hot new prospect. Emailable.</p> <p>✓ 2/17/2010 ACTION Call this referral. Reference is Suse Dicchio. - SAB [02/17/2010]</p> <p>✓ 2/12/2010 LETTER SENT ENQUIRIES/RELATION - "Please" give me your name. Emailable.</p> <p>✓ 2/12/2010 NOTE Incoming Ltr. - SAB - Suse Dicchio called. She's recommended us to Beatrice Portinari, her friend from many community activities. Rich's husband is Prof. Dante Afghanchi. Both in their 50s and have been best friends since college.</p> <p>✓ 9/27/2010 LETTER SENT SERVICE-SIGNATURE REQUIRED-2ND MESSAGE - Signature required message</p> <p>✓ 9/27/2010 LETTER SENT SERVICE-SIGNATURE REQUIRED-2ND MESSAGE - Signature required message</p> <p>✓ 9/27/2010 LETTER SENT SERVICE-SIGNATURE REQUIRED-2ND MESSAGE - Signature required message</p> <p>✓ 9/27/2010 LETTER SENT SERVICE-SIGNATURE REQUIRED-2ND MESSAGE - Signature required message</p>

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Maintain Contact Group - Oldebucks, Velda

Contact Group

Auto Correct F6 F7

List Client No Contact Interval

Walk-In Retired 30 Opportunity Review Interval

Book Wealth 1: Above \$500K 180 Ready Funds

C = Cautious Communication Channel Letter First Contact Date 2/22/2010

Communication Status Normal Last Meeting Date 2/24/2010

Last Contact Date 4/26/2010 Last Message Date 8/16/2000 Last Opportunity Review Date 2/24/2010 Default to Business Address

Primary System Owner Nickname Rights Harry Dent's Book

Isellers FR Mat Wanted No Show Phase 2 Lead Planning Planning Freq

Secondary System Owner SA SC SCA SMD Sif Min

Salesperson **Next >** **Back** **Close** **Help**

FIG. 8

10:30 AM - 116900660

T09020 "16900660

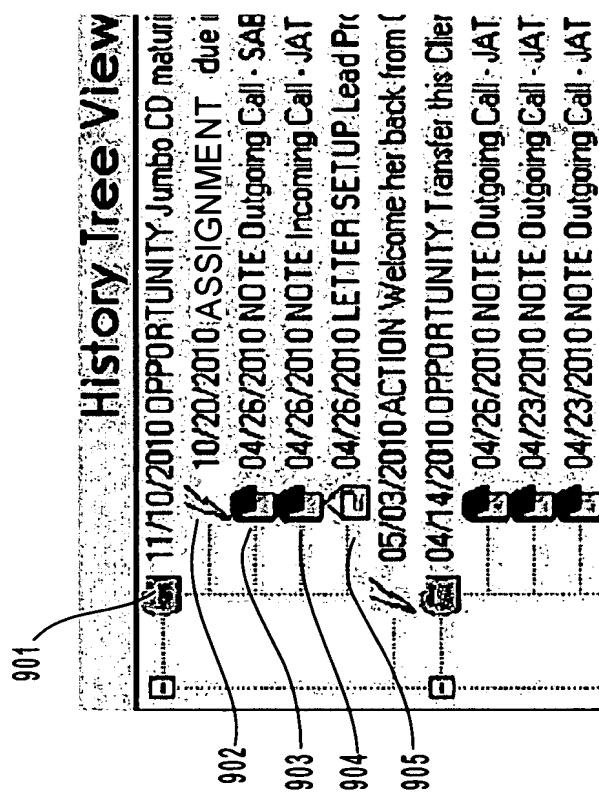
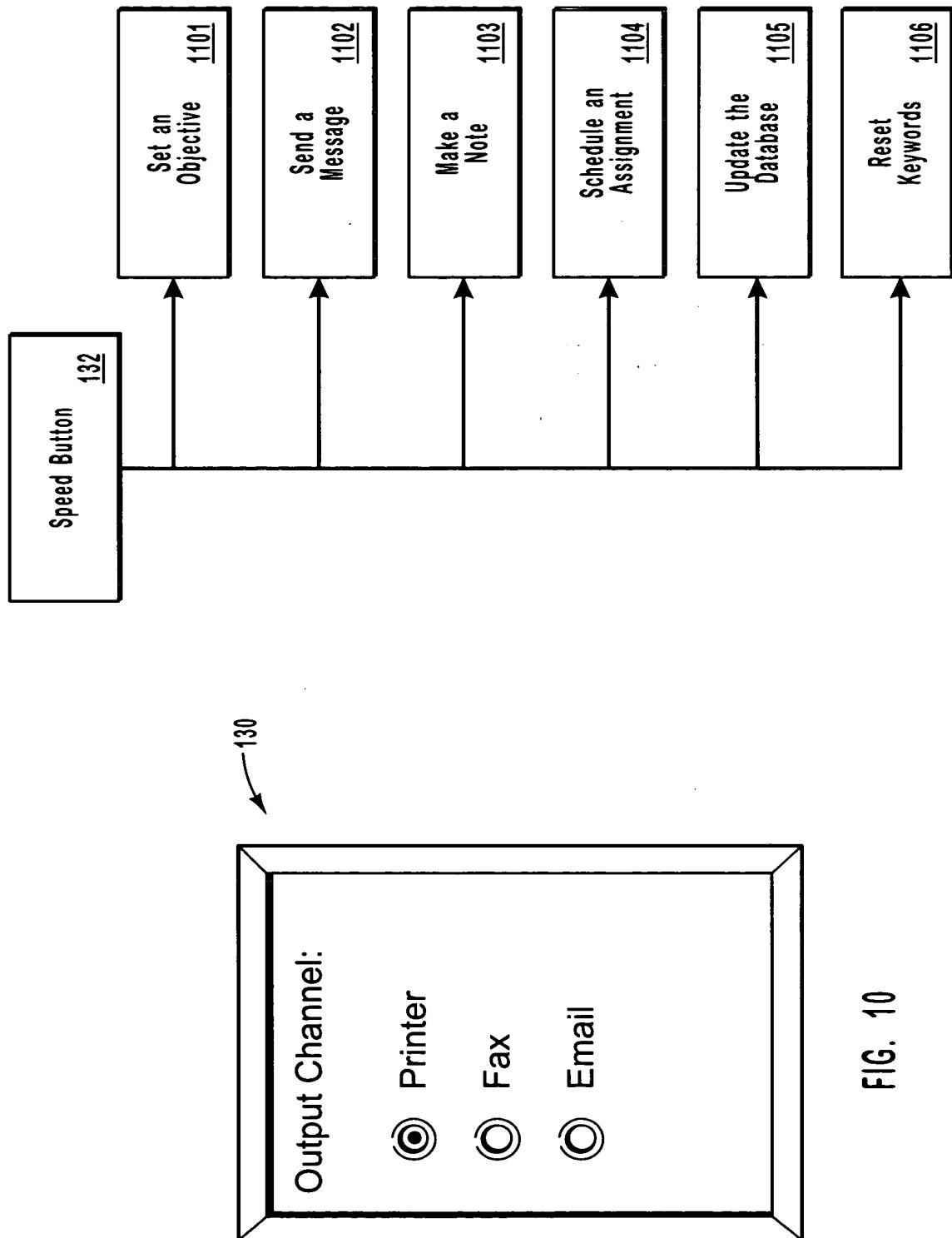


FIG. 9



T 0 9 0 2 0 " 4 0 9 0 0 6 6 0



FIG. 13A

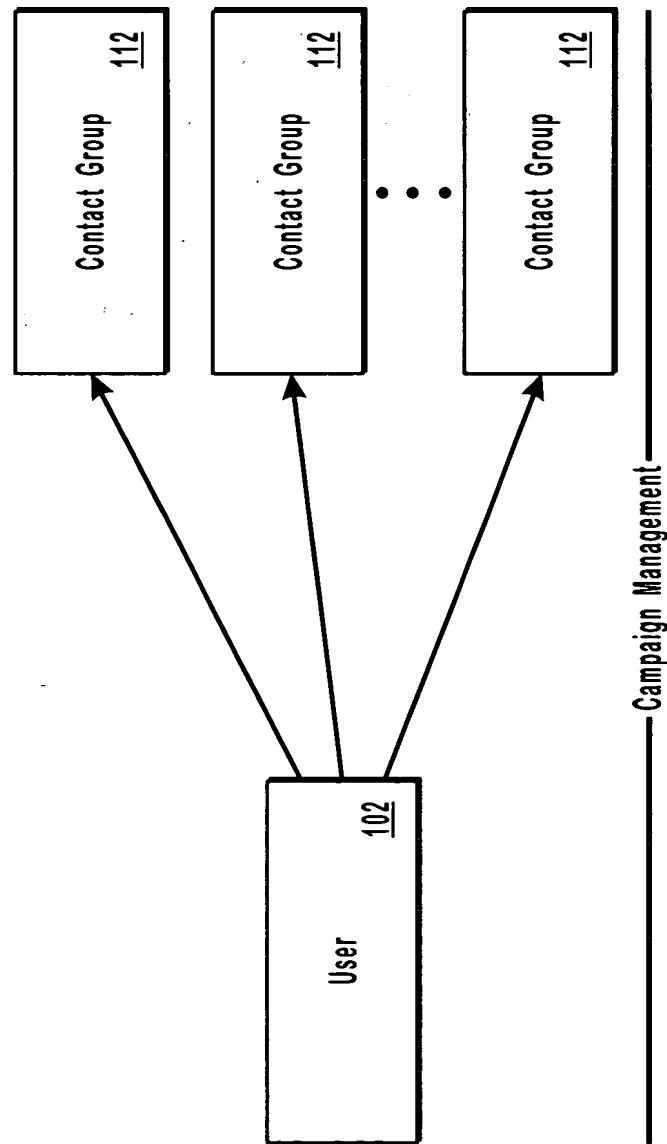


FIG. 13B

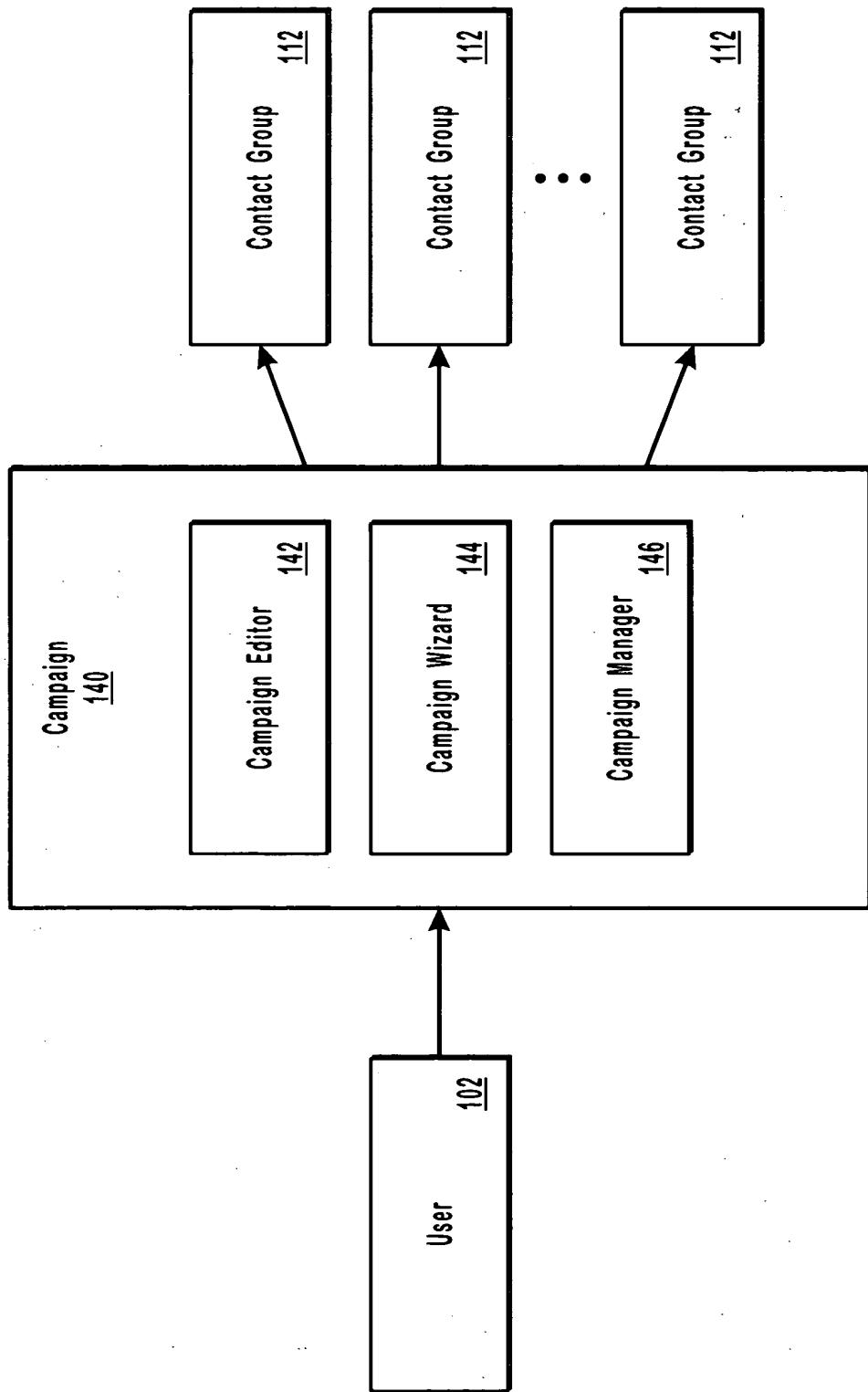


FIG. 13C

T09020 "416900660

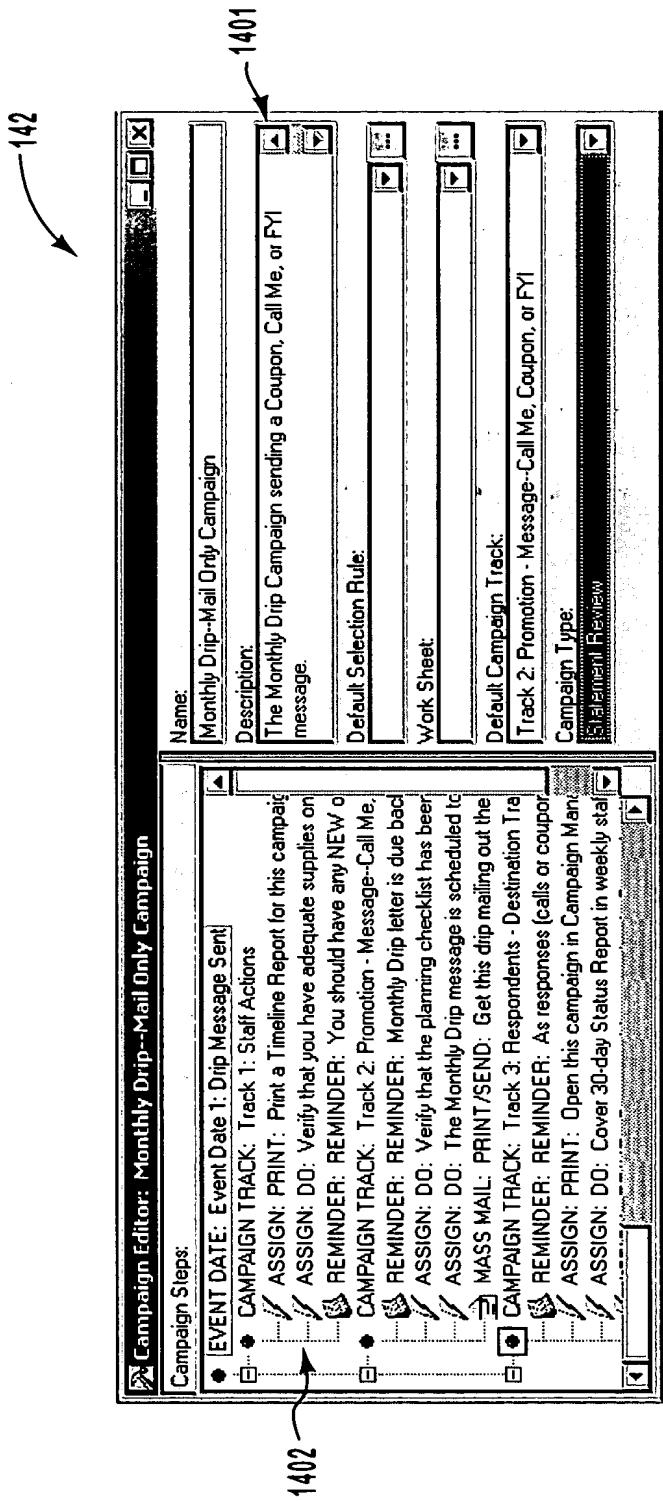


FIG. 14

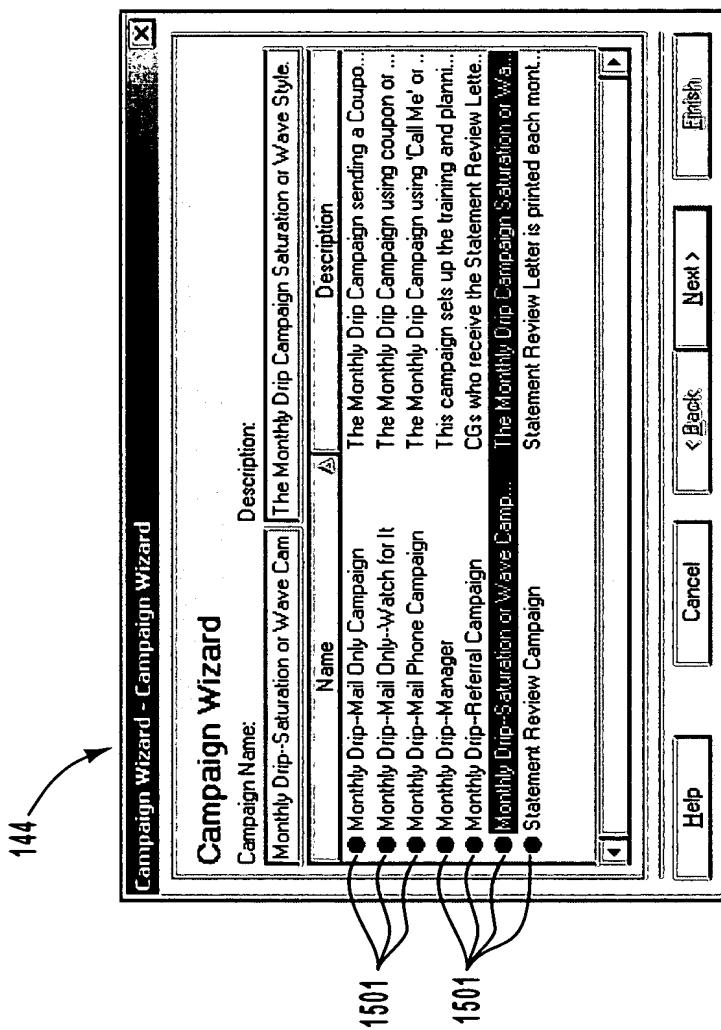


FIG. 15A

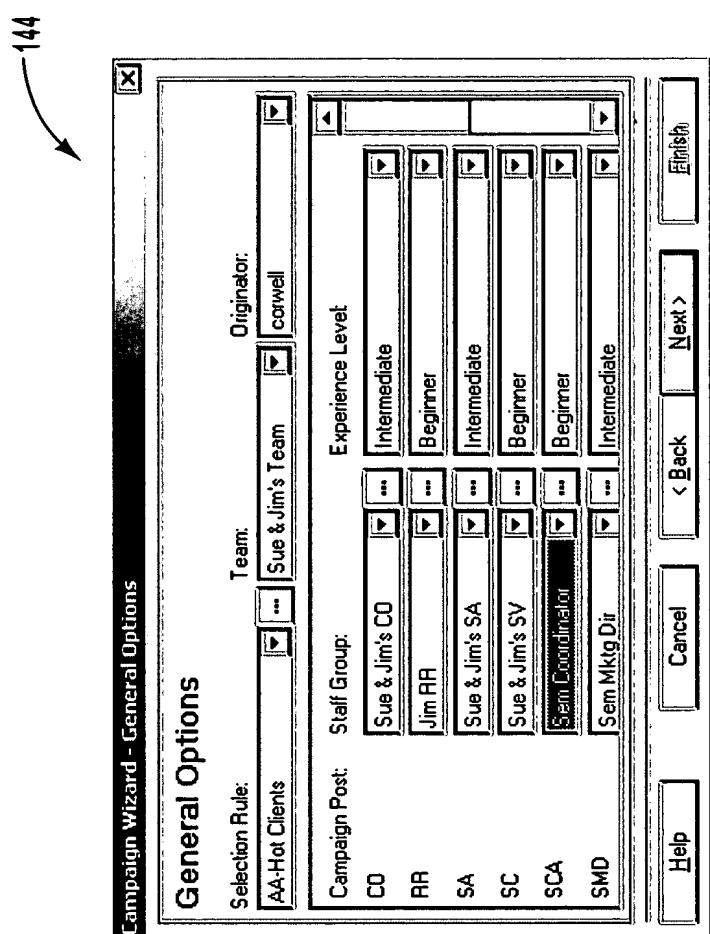


FIG. 15B

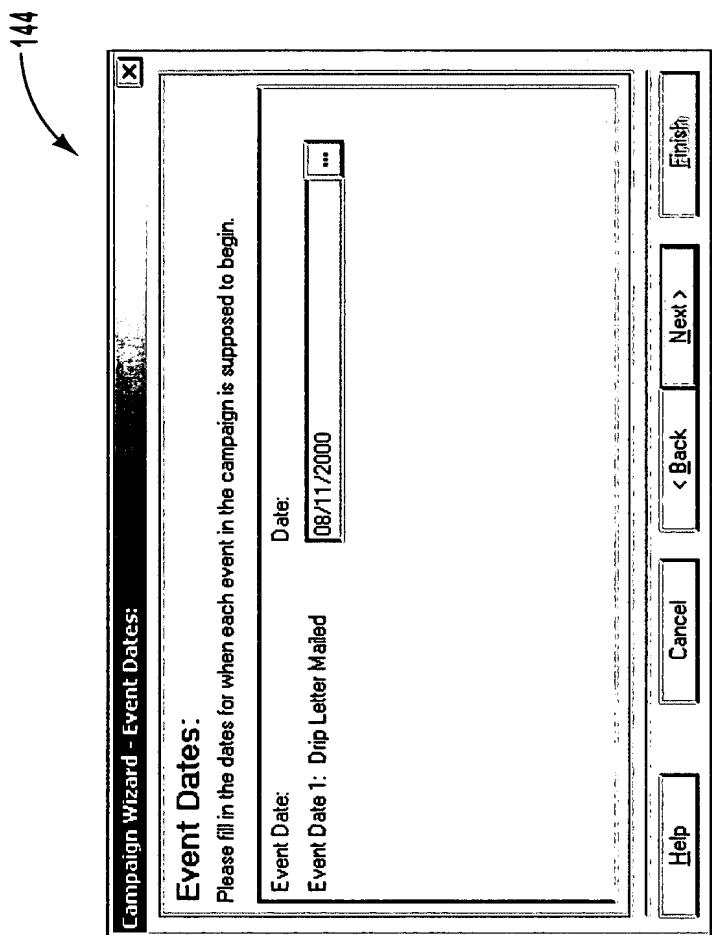


FIG. 15C

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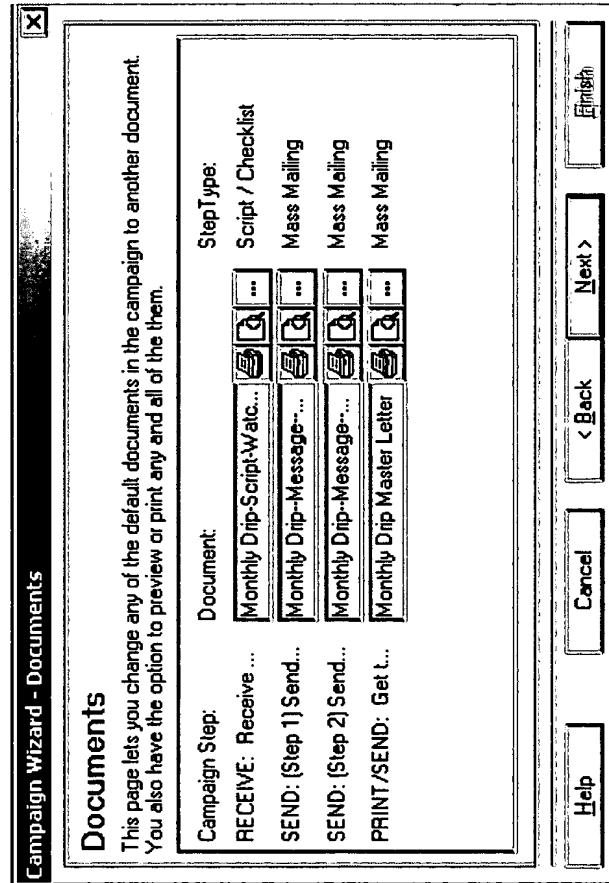
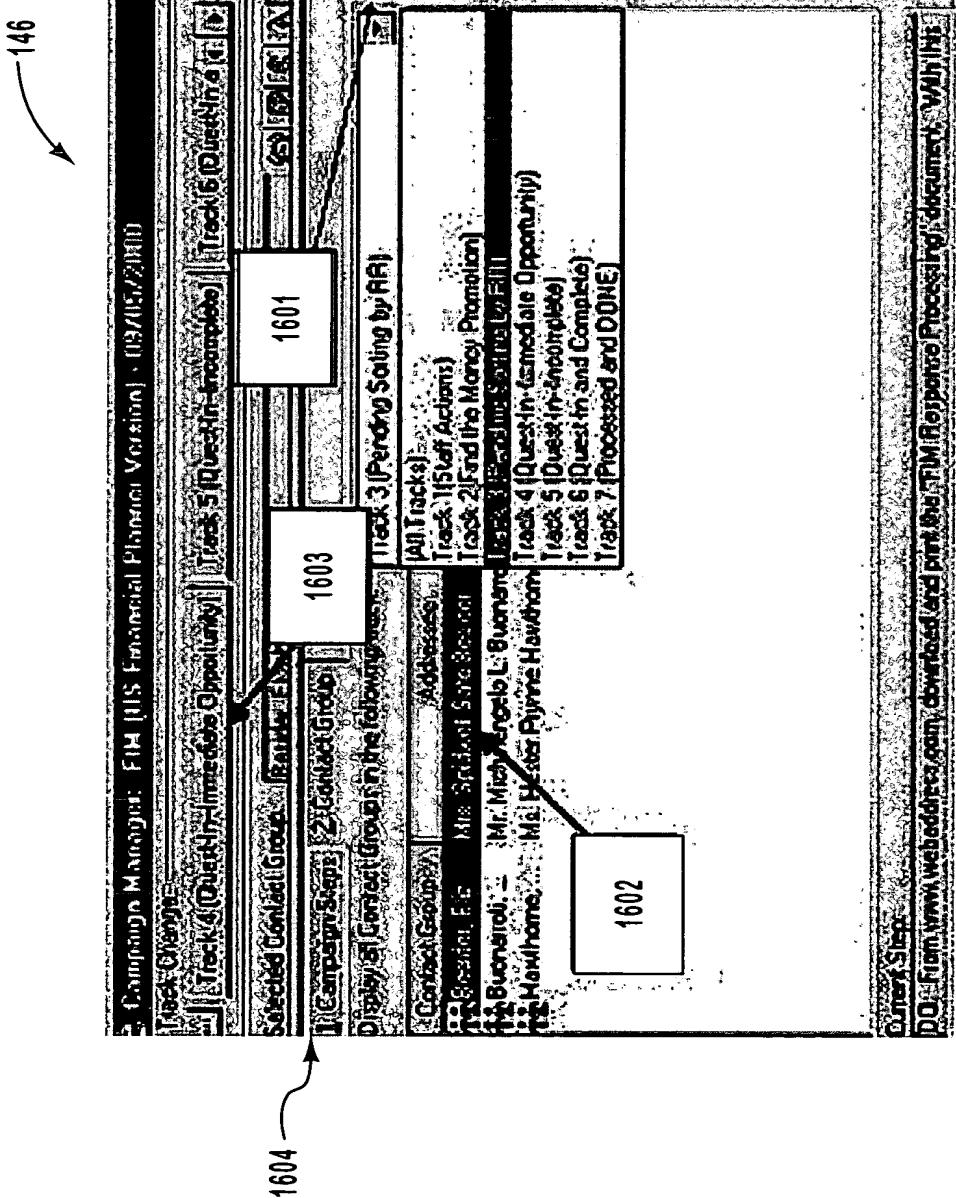


FIG. 15D

T09020 "416900660



09000694 "0220604

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FIG. 16B